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# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland December 24, 2002

## Behold: the Fairs Deliver!

The CM/ECF Fairs held in Baltimore and Greenbelt last month were a great success. More than 280 attended the Fairs held at the Wyndham Hotel and the Sheraton College Park. The Fair program included speakers from the court, attorney testimonials, computer demonstrations and a vendor display. Each attendee also received a readiness kit.

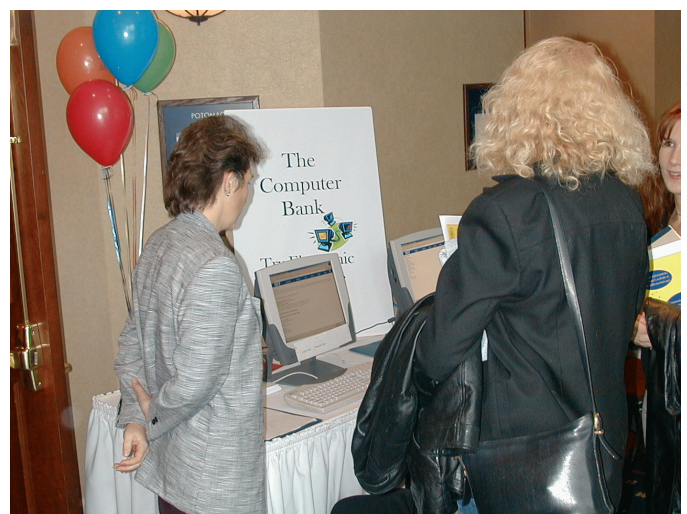
If you missed the Fair, information from the readiness kit is available on our website. Training dates and a training registration form are also available on our website, [www.mdb.uscourts.gov](http://www.mdb.uscourts.gov).



Judge Keir opens with remarks about the Court's implementation plans.



Between sessions attendees peruse vendors' displays and compare notes.



Everyone takes a turn filing electronically at the computer bank.

## Dear Sourcerer:

**How do I file an electronic document requiring the signatures of several attorneys?** On an electronically filed document your signature is represented by a /s/ before your typed name on the signature line of the document. When more than one attorney signs the document, a hard copy bearing original signatures will be maintained by the filing party per local rules and the electronic copy will have a /s/**attorney name** signature line for each signing attorney.

**Will the court still provide certified copies?**

Yes, the clerk's office will continue to provide certified copies of documents, whether they have been filed electronically or in paper format, pursuant to Federal Rules of Bankruptcy Procedure 5005 (a) and 5006. Based on a review of other courts using CM/ECF, we will print the document and then certify it.

**Can I file documents electronically with colored text?** Colored text adds to the file size of a pdf document and larger files will potentially slow the system for other users. Therefore, do not use colored text.

**Email questions to:**  
**[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)**

[www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)

## Hot Off the Press-Team Updates

**Chambers** - "E-Orders" has been released. The chambers team, with some assistance from operations and training, is reviewing and testing the order processing program.

**Communications** - Final touches are under-way for the marketing campaign, planned for January, to promote applications training for external users.

**Dictionary** - The crew is checking the accuracy of data converted from BANCAP.

**Operations** - This team is in the process of testing and validating all the instructions in the new case administration manual.

**Technical** - The first of several test data conversions from BANCAP to CM/ECF was successful. Version 2.1 will be installed soon, along with the interactive credit card program. The team will be very busy analyzing the new software and refining the judge and trustee assignment module.

**Training** - The trainers are gearing up for the pilot group training in January, 2003. Training for the general bar begins in February, 2003.

( We wish to acknowledge Sandy Frank, Diane Hydovitz, Kathleen Lewis, Paula Seagraves and Denise Smith as contributing authors and Alan Schut as photographer. Thank you!





# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland October 23, 2002

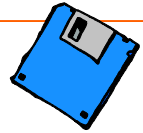
## Step Towards Paperless

**Matrix on Disk** - To gently introduce our customers to the concept of filing electronic documents, to minimize noticing errors and to streamline input of creditor data into the court's database, effective November 1, 2002, we are implementing a new procedure requesting and strongly encouraging attorneys to file their creditor matrices in text format on diskette.

According to local rule 1007-2 (b) the matrix must adhere to specific format requirements. It is typically prepared in a word processing program and printed for submission to the court. Rather than printing the matrix, effective November 1, 2002, attorneys can save the word processing document as a text file to a disk. The electronic version of the matrix is much easier to produce and submission on disk greatly reduces the number of noticing errors. Since the court currently accepts the matrix on disk for larger cases, many attorneys are already experienced with providing the matrix in this format. Per local rule 1007-2 (d) the verification must still be submitted with the matrix, in paper format as is done today.

We hope to reduce attorneys' work as we take the first step towards a paperless court.

### Matrix Format



Complete instructions are located on our website ([www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)), at our intake counters and will be available at the Fairs. Here is a summary:

- Complete address, clearly typed.
- **Left justified** in a single column.
- Each address must be single-spaced.
- Single-space between each address.
- 3.5" floppy diskette prepared on an IBM compatible computer.
- The court cannot read diskettes created on a Macintosh computer.
- Any word processor can be used to create the matrix.
- Save the matrix as a text file.
- The file name of the matrix should be the debtor's last name and first initial. (i.e. SMITHJ.TXT)
- More than one matrix can be saved on the same diskette if you are filing multiple cases at the same time.
- Diskettes will be scanned for viruses, processed and returned unless mailed to the court.
- A paper matrix will still be accepted.

( We wish to acknowledge Rick Thompson as a contributing author in this issue:  
Thank you!

[www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)

## Dear Sourcerer:

Will attorneys who are already filing electronically in other districts be able to waive training in Maryland? Yes. The court's training team is developing procedures that would allow attorneys to waive training if they certify:

- ' they have been trained in another district
- ' they have read and understand all administrative orders, procedures and local rules pertaining to electronic filing in the District of Maryland.

### What exactly is the CM/ECF Fair?

The court is hosting a fair in Baltimore, November 14 and in Greenbelt, November 21 to provide our customers with all the information they'll need to file electronically. There will be vendors representing software compatible with CM/ECF, CM/ECF filing demonstrations, a hands-on opportunity to connect to our training database and the latest court procedures and policies related to this new system.

Admission is free, but you must register with the court by October 28, 2002 by emailing: [marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov). Just let us know which date you plan to attend, who is attending, the firm name and a contact telephone number. Visit our website at [www.mdb.uscourts.gov](http://www.mdb.uscourts.gov) for more information or pick up an invitation at the intake counter. See you there!

Email questions to:  
[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)

## Hot Off the Press-Team Updates

**Chambers** - Next week the judges will see a demonstration of "E-Orders", the order processing program created in the Western District of Texas.

**Communication** - see Dear Sourcerer.

**Dictionary** - The version 2 dictionary is being reviewed for changes, and final modifications are being made to docketing events.

**Operations** - High-volume creditors are being sought and identified for electronic claims filing.

**Technical** - Our hats are off to this team! They have been busily working backstage since Version 2 came on the scene in September. While some work tirelessly on database configuration, form conversion and more, others have begun mapping all the BANCAP events to similar events in CM/ECF for a smooth data conversion in January. The team also stands at the ready to install and customize an order processing program, the interactive credit card program, the case upload functionality, the latest version of VCIS and CM/ECF Version 2.1, all expected to arrive later this year.

**Training** - The trainers are gearing up to provide application training for court staff starting next week. Training for the attorney pilot group will occur in December. This is going to be a busy season for them!



# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland September 18, 2002

## A Fair to Remember!



*HEAR YE, HEAR YE,  
HEAR YE*



*The U.S. Bankruptcy Court,  
reigning in the District of Maryland, proclaims  
November 14<sup>th</sup> and 21<sup>st</sup> in the year 2002  
as CM/ECF Fair Day.*

*All Counselors and Pages are invited  
and can look forward to receiving royal invitations  
by October 7<sup>th</sup>, 2002.*

*Hear how our Wizard will guide you from  
Medieval Times to the Electronic Filing Age.*

### Dear Sourcerer:

#### **Will the CM/ECF system be user friendly?**

Absolutely, for both court users and external users! Using your mouse, you'll point and click on simple menus to navigate around the system. Until you click on *Submit* to file the document, mistakes can be erased with the click of your browser's *Back* button. Just remem-

ber, once the document is filed, mistakes can only be corrected by filing an amended document or making a corrective entry.

( We wish to acknowledge Diane Hydovitz, Judy Jackson, Janet Meyers, Paula Seagraves and Denise Smith as contributing authors in this issue: Thank you!

[www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)

## Dear Sourcerer:

**When will attorneys be able to file electronically?** The court plans to convert to CM/ECF in January 2003. There will be a brief period of time during which the attorney advisors will be the only external users filing electronically to confirm that the system is working as expected and that court procedures are effective, from the perspective of external users. Hear more detailed information about a “go live” date for all other users at the upcoming CM/ECF Fairs in November.

**When will CM/ECF training be available?**

**' For attorneys '** Application training for the court's attorney advisors will begin in December. Training will be available for all attorneys and their appropriate staff members during January, February and March, or until all interested attorneys have been trained. Then training will be offered as needed for new attorney users. The Fair will provide an opportunity to learn more about training and to register for class.

**' For court staff '** Application training for court staff will begin October 21st and continue through November 18<sup>th</sup>. Each staff member will attend one session weekly from 9:00 to 1:00 for a total of four sessions. Sessions will include file management, reports, case opening, setting and noticing of §341 meetings, motions, calendar management including setting of hearings, claims, orders and discharging and closing cases.

Email questions to:  
**[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)**

## Hot Off the Press-Team Updates

**Chambers** - Calendar options currently being used in CM/ECF courts are still being explored. An order processing solution created in the Western District of Texas, “E-Orders”, is also being explored. Texas Western is expected to release the program to other courts in November.

**Communication** - Invitations to the CM/ECF Fair are under development. The Fair, being held in both Baltimore and Greenbelt in November, will include live filing demonstrations, the chance to chat with vendors, and informational updates on order processing, proposed local rules, training and credit card payment. If you haven't received your invitation in October, see our website for information and to RSVP.

**Dictionary** - The version 2 dictionary is being reviewed for changes, and final modifications are being made to docketing events.

**Operations** - New scanning equipment will be here soon! The team is polishing up the Case Administration Manual and tackling development of quality control procedures.

**Technical** - Version 2 has successfully been loaded into the training database. Behind the scenes work continues on form conversion, report configuration and evaluation of ancillary software programs.

**Training** - See Dear Sourcerer.



# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland August 21, 2002

## The Wizard's Round Table

The support of our customers is crucial to the successful implementation of CM/ECF. To promote an exchange of information with our customers, we have established advisory groups with representation from the Bar, the Office of the U.S. Trustee and trustees.

The Chambers Advisory group is researching proposed local rule changes and administrative orders. They are evaluating electronic submission of proposed orders, electronic provision of debtors' signatures and privacy issues.

The Trustee Advisory group will analyze the impact of CM/ECF on preparing for and conducting §341 meetings. They will also address such issues as managing email

notices and debtors' signatures.

The Training Advisory group will evaluate our training materials and presentations, and test attorney and trustee docketing events.

The Communications Advisory group will critique our marketing strategies and recommend methods of disseminating critical information.

We are especially proud of the partnership with our customers represented by these advisory groups and are confident that together we'll reap the benefits of CM/ECF.

For a listing of members of each advisory group, refer to the Contacts link on our CM/ECF web page.

### Hot Off the Press -Team Updates

**Chambers** - Proposed local rules and guidelines pertaining to electronic filing are shaping up.

**Technical** - Work has started on the conversion of forms (for example the §341 meeting notice) to HTML, which will be standard in Version 2 of CM/ECF.

**Training** - Training plans are being fine-tuned and the team has acquired software to customize training materials.

### HEAR YE! HEAR YE!

A Fall Fair is being planned for November to jumpstart CM/ECF. The fair will be held in Baltimore and Greenbelt.

**SEE the Demonstrations, MEET the Vendors  
TOUR the website and REGISTER EARLY  
for TRAINING CLASSES.**

COME ONE COME ALL,  
More to follow....





## Dear Sourcerer:

I don't understand the electronic process one needs to go through to transmit files to the court. Where can I get practical guidance on everyday usage of CM/ECF? The electronic filing process is simple.

**Step 1:** Prepare the pleading in your word processing software and convert it to a pdf file, or scan the pleading and save it in pdf.

**Step 2:** Go to [www.mdb.uscourts.com](http://www.mdb.uscourts.com) and select the CM/ECF link, then select Login. Use your court issued login and password.

**Step 3:** Click on Bankruptcy. Then select the event you wish to file from the menu.

**Step 4:** Follow the prompts and attach the pleading (pdf file). If there is a filing fee, pay it online with your credit card.

**Step 5:** Once you receive the Notice of Electronic Filing, you have successfully filed electronically!

An interactive tutorial is available on the court's website under the CM/ECF link, Online tutorial. We highly recommend you try at least two of the modules: Bankruptcy Case Opening and Filing a Motion. However, all of the modules are helpful. Each module takes about 30 seconds to load and less than 5 minutes to complete. Complete the tutorial, and you will be at the head of your training class!

Email questions to:  
**[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)**

( We wish to acknowledge Diane Hydovitz, Steve Marvin, Lionel Moore, Paula Seagraves and Ken Ridgeway as contributing authors in this issue: Thank you! **Next issue: September 18, 2002**

## Just Released

"With the migration to CM/ECF I wonder if that will shorten my wait time at Intake?", one attorney asked. Although the court is hopeful that the majority of our filers will prefer the convenience of filing electronically, we recognize that we will still need an efficient method for accepting paper filings.

The Operations Team recently visited the Bankruptcy Court in the Northern District of Georgia, Atlanta Division. In Atlanta, paper documents received over the counter or in the mail are routed to the Case Administrator, who prepares the documents for scanning and scans them in large batches at a high speed scanner.

We were impressed with the efficiency of the Atlanta process, the quality of images scanned, the volume of documents processed daily and the speed with which documents are scanned and converted to PDF format. The team returned from Atlanta with a scanning solution proposal which includes many of the aspects they saw working well in Atlanta.

Our goal is efficiency and providing express services to our customers at Intake. We think we have found the answer in electronic filing coupled with an efficient method for processing paper filings.

Missed out on a previous issue? Visit [www.mdb.uscourts.gov](http://www.mdb.uscourts.gov), click on the CM/ECF link and then click on the Newsletter link.



# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland July 24, 2002

## OPEN FOR SUGGESTIONS

### Rate the Newsletter

**T**he CM/ECF newsletter has been in publication and informing internal and external customers for the past three months. The Communication & Marketing team would like to know **how well** we are doing our job, keeping you informed on the up to date progress, rollout and usage of CM/ECF. Attached please find an **easy** survey. Sit back, while you have your coffee, soda, water, etc and take the time to **RATE THE NEWSLETTER**.

You may drop the survey off at either the Baltimore or Greenbelt intake counter. Or you may email your responses to [marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov).



The Systems team (left to right: Cathy Graziose, Angela Powers, Andrew Suggs, Lauren Nam, Rick Thompson - lead, Alan Schut, Valsena Summers, Dalu Li, Steve Marvin, Shengli Wen) is busy researching options for the scanning, cash register, order processing and calendar functions.

The transition to CM/ECF will initially create a heavier scanning workload due to scanning documents filed on paper. We've learned that other courts have chosen a high speed scanner (90 pages a minute) that, when combined with the right software, will streamline the scanning process by automatically naming files and placing them in team folders to make retrieval easier.

FINSYS will continue to be our cash register. We are currently evaluating how the judge and trustee selection tools work along with the chapter 13 confirmation hearing scheduling.

We were excited by a demonstration of e-orders, created by the Texas Western Bankruptcy Court. Their solution allows attorneys to file proposed orders in CM/ECF. Court staff can then electronically send proposed orders to chambers staff, reducing the confusion of where the proposed orders need to be sent.

The calendar function in ECF presents many challenges. We are evaluating alternatives to this calendar by learning what is needed by our courtroom deputies and judges.

All in all, we are eager to tackle the challenges in these four areas!

## Dear Sourcerer:

**How do I contact the court when I have questions about using CM/ECF?** We definitely want to hear from you! There are several ways to contact the court:

1. Email the marketing team at [marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)
2. Complete the attached survey.
3. Visit [www.mdb.uscourts.gov](http://www.mdb.uscourts.gov), click on the CM/ECF link and then click on Contacts under the wizard. Call or email the appropriate contact person.

**What hardware and software will I need to file documents in ECF?**

- T A personal computer running a standard platform such as Windows or Macintosh
- T Windows based versions of Microsoft Word and WordPerfect, or petition software that will print to PDF format
- T Internet access and a browser. The system is certified with Netscape 4.7 or greater and is being tested with Internet Explorer 5.x or greater
- T Adobe Acrobat PDF Writer software or pdfFactory software to convert documents into PDF
- T Scanning equipment may be useful

For more detailed information about hardware and software, go to our website, [www.mdb.uscourts.gov](http://www.mdb.uscourts.gov), click on the CM/ECF link and then click on System Requirements located under the wizard.

**Email questions to:**  
**[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)**

## Hot Off the Press-Team Updates

**Chambers** - A calendar sub-committee is identifying calendar requirements and exploring calendar options currently being used in CM/ECF courts.

**Communication** - Plans have resumed for an attorney fair in November.

**Dictionary** - The dictionary is shaping up! Current events are being improved and new events have been proposed.

**Operations** - Team reps are traveling to Atlanta August 1<sup>st</sup> to evaluate the scanning and quality control processes.

**Training** - The PDF, file management and browser class is being created and will be offered in the fall to all users.

( We wish to acknowledge Sandy Frank, Denise Smith and Rick Thompson as contributing authors in this issue: Thank you!

**CM/ECF: Your Key to the Clerk's Office**

**Available in January 2003**

Missed out on a previous issue? Visit [www.mdb.uscourts.gov](http://www.mdb.uscourts.gov), click on the CM/ECF link and then click on the Newsletter link.

**Next issue: August 21, 2002**

[www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)



## RATE THE NEWSLETTER

1. What do you like about the newsletter?
2. What would you like to see included in future newsletters?  
(Ideas or Suggestions)
3. How has this newsletter helped you with CM/ECF?
4. How informative is this newsletter? Circle One
  - 1= very informative
  - 2= informative
  - 3= somewhat informative
  - 4= not informative
  - 5= no opinion





# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland June 19, 2002

## CM/ECF CALMS COURT FEARS

### A Typical Day For A Case Administrator In A CM/ECF Court

The thought has probably been going through many Case Administrator's minds "How will my job duties change? How about my job security when CM/ECF goes live?"

CM/ECF will change the role and job duties of a Case Administrator. Docketing in Bancap is about 80% of your job function and filing, reports, rotations, etc. are about 20%. This will change when CM/ECF goes live. The public will be docketing cases and pleadings, so that 80% of docketing will change to 80% or sometimes 100% of Quality Control Assurance.

The New York Southern Bankruptcy Court was contacted to give us a breakdown of a typical day. Their day included three basic functions of Quality Control (Review, Corrections, and Administrative functions) and other numerous duties performed.

Quality Control:

A. Review of Reports- docket activity, cases and adversaries filed

B. Correction of Entries- may include contact with attorneys and editors

C. Administrative Functions- docket entries only performed by court, determine if docket entries by public are necessary, review discharge and closing reports

Other Duties: Daily Reconciliation of Cash Receipts, Help Desk, Training, Docketing and Scanning.

You can see a typical day for a CA will continue to be busy, but different. Our duties will also include intake and mail desk rotations. Our duties will change but we will still be essential to the court.

### Dear Sourcerer:

Can an attorney authorize someone in their office (such as a paralegal) to use their login name and password to file documents in ECF? Yes, but the court recommends that such access be very limited and controlled since whatever is filed under the name and password is deemed to have the attorney's signature on it.

Can a document filed in ECF be deleted? No. A document cannot be deleted (or modified) on the Electronic Filing System because it is instantaneously available electronically and may have been viewed and relied upon. If an attorney submits the wrong document, he or she must submit a corrective entry per the court's procedures.

Can the docket text be modified? Only court users have the option to modify docket text.

Email questions to:

[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)



## We're Off to See the Wizard....

The Intake sub-committee (pictured left to right: Sharon McGuire, Dalu Li, Judy Jackson, Rick Thompson, and Janet Meyers)



recently traveled to Kansas City, MO to visit the Bankruptcy court, which went live with CM/ECF in March 2001. We observed their intake process, text order processing and a demonstration of CM/ECF version 2 and realized, "We're not in Kansas anymore".

Just as Dorothy and Toto were on their journey home, our team completed the task of selecting a cash register system. After comparing several different options we decided to keep the current cash register program we know and love, FINSYS.

Like the Scarecrow searching for his brain, the intake team is now determining how to smoothly transition to an electronic intake environment. We are hoping to have the c-c-c-courage that the Cowardly Lion had to fulfill our mission.

In an effort to finally reach Oz, we will be testing the features that CM/ECF offers such as auto-case numbering, auto-discharge, judge/trustee selection, and on-line credit card approvals.

Stay tuned for more adventures on the "yellow brick road".

## Hot Off the Press-Team Updates

**Chambers** - The team is making progress in assessing order processing programs. The Chambers Attorney Advisory Group is researching possible local rules changes.

**Communication** - Due to the implementation delay, the newsletter is taking a summer vacation, with monthly issues only. Next issue: July 24, 2002.

**Dictionary** - All staff are being added to the training database. Instructions and logins will be provided so that staff can experiment with the database and become more familiar with the application.

**Operations** - A trip to Atlanta is being planned in July to look at their scanning program and QC process.

**Technical** - The techs are working with operations to explore scanning solutions.

**Training** - A PDF, file management and browser class is under development. It will be offered to all users as a precursor to Applications training.

( We wish to acknowledge all of our contributing authors in this issue: Sandy Frank, Judy Jackson, Janet Meyers, Denise Smith and Rick Thompson. Thank you!

[www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)

Available in January 2003



# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland June 5, 2002

## Better Late Than Never

The Administrative Office of the United States Courts, which oversees the rollout of CM/ECF, recently announced a delay in the release of Version 2 of the software due to the need for more testing. I would like to explain why Version 2 of CM/ECF is so important to the implementation of CM/ECF and our court's ability to continue to offer the high level of service our constituents expect.

Version 2, which was previously scheduled for national release in June 2002, offers functionality which is equivalent to that which we currently have combined in our cash register and docketing systems. Specifically, Version 2 offers judge and trustee assignment and the automatic scheduling of §341 meetings. This update will also have the capability to automatically discharge and close cases meeting pre-set criteria. These are automated functions we rely upon to continue operating efficiently, especially with a growing caseload. Implementing CM/ECF before the release of Version 2 would mean a loss of these automated functions and a return to manual performance of these tasks or development of other temporary automation alternatives. I believe you will agree that the best approach is to focus our available resources

on preparing for Version 2.

Version 2 is now expected to be available to the courts late this summer. We will do all we can to prepare for Version 2; however once the new software is available, we need to work behind the scenes for several months to ensure a smooth transition. One of our tasks will be converting all of our electronic forms, such as §341 notices and discharges, to the HTML format. This is a time-consuming but necessary task. With the delay of the release and the required work on the part of the court, our proposed new "go-live" or start date is now January 2003. This date is for your planning purposes and the court will do everything in its power to keep on schedule.

Thank you for your support as we continue our efforts to implement CM/ECF in Maryland. Our goal is to successfully transition to an electronic environment by the best possible means, which may not be the quick path, but the right one. Although the delay is a minor setback for the court and our constituents, I am sure you will agree the advantages of waiting for the release of Version 2 are for everyone's benefit. We hope you will continue to be as excited as we are about the arrival of CM/ECF.

***Mark D. Sammons, Clerk***



## Just Released!



The Dictionary Team (pictured above, left to right: Katie Nader, Valsena Summers, Angela Powers - lead, Libby O'Connor, Roxanne Smith, Sophia Ward, Vicky Harper and Ellen Devine - not pictured) has been very busy. Members have completely scrubbed the Bancap Dictionary in order to determine which events are needed in the CM/ECF Dictionary. Also, the team recently completed evaluation of the events in the CM/ECF Starter Dictionary in order to determine what modifications should be made.

Our next step is to begin making all those modifications. Then we'll create CM/ECF events that are currently utilized in Bancap, and finally we'll construct all of the brand-new events that have been agreed upon.

In June all of the material from the Testing Database will be copied to the Training Database. At that time case administrators will be able to access the Training Database via the Intranet so that they may become more acquainted with our new application. Stay tuned for your login and password to the CM/ECF Training Database.

CM/ECF: YOUR KEY  
TO THE CLERK'S OFFICE

## Dear Sourcerer:

**Can any member of the public use CM/ECF to file documents?** No. Filing is available to authorized users only. Filing a document requires a login and password, which the court provides only to trained, authorized attorneys, trustees and court staff. The court will provide public access to the system at the Clerk's Office for viewing electronic files.

**How does an attorney become an authorized CM/ECF user?** Potential users may register for training with the court. Closer to the "go live" date, the court will offer numerous training classes in both the Baltimore and Greenbelt locations. Attorneys and their staff will be able to register for training by obtaining a registration form online or at the court's divisional offices. Attorneys will receive a login and password for CM/ECF after successfully completing training. Although attorneys may choose to let others use their login to file, the document will be considered filed by the person whose login and password were used.

Available in January 2003

Email questions to:

[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)

**OOOPS!** In the last issue, we printed a picture of the Chambers Team. Did you recognize them? Back row, left to right: Booker Livingston, Melanie Matesic, Judge Keir, Karen Herb, Mary Lee Zimmerman, Cathy Graziose. Front row: Susan Roberts, Karen Reddersen - Lead, Nancy Porter, Anna Pacella-Holt (not pictured).

( Our contributing authors in this issue were: Diane Hydovitz, Janet Meyers, Mark Sammons and Angela Powers. Thank you!

[www.mdb.uscourts.gov](http://www.mdb.uscourts.gov)





# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland May 22, 2002

## CM/ECF Solves Age-old Debate

### To Scan or Not To Scan...

**D**ocuments stored in the CM/ECF system can vary greatly in file size. The size of the file has a direct impact on how fast the file is loaded into the system and how fast others can open it for viewing. If the file is very large it takes longer to open.

So how can you have an impact? If you have an electronic version of a document, and write the file as a PDF file directly you create a much smaller file than if you scan a document and then save it to a PDF.

For example: a 6 page WordPerfect document = 44Kb. The same file saved directly as PDF = 22Kb. The same file scanned and then saved to PDF = 319Kb.

So when you scan a document, the size of the resulting file is nearly 15 times larger than writing it directly as a PDF document.

We recommend you use a word processor that can save files in PDF format (MS Word does not, WordPerfect 10 does) or purchase and install Adobe Acrobat 5.0. The standard Adobe Reader can only read PDF files so be sure to purchase the correct version.

### Dear Sourcerer:

**Will all federal courts offer electronic filing?** The use of CM/ECF's electronic filing capability is at each court's discretion. Many courts have implemented electronic filing, or are in the process of implementing it. For information about whether another court will be offering electronic filing, contact that court.

**Are there CM/ECF prototypes in District Courts as well?** Yes, four federal District Courts are currently assisting in the development of a version of CM/ECF for civil cases. At present there is no version for criminal cases. The Fourth and D.C. Circuit Courts of Appeals were recently designated as prototype courts for the appellate version of CM/ECF, which is under development.

**Who "owns" CM/ECF?** CM/ECF is an automation project in the federal judiciary. All software development is done centrally by employees of the Administrative Office of the United States Courts in Washington, D.C. The prototype courts are consulted for recommendations.

Available in Fall 2002!

Email questions to:  
[marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)



## Just Released!



The Chambers Committee has hit the road! Members of the committee have traveled near and far researching different methods for CM/ECF order processing, calendaring, and file management. Visits to New York, Richmond and even San Diego have provided vast information related to chambers work flow. The team is currently exploring BOPS; an order processing system from Richmond that accepts proposed orders via e-mail and forwards them to chambers with the click of a button. They are also considering local rule revisions, the use of docket text orders, and a CM/ECF calendar solution.

As the team marches forward, they look to recruit some assistance from members of the bar, as well as representatives from the U.S. Trustee's office. Stay tuned for more tales from the road... .

CM/ECF: YOUR KEY  
TO THE CLERK'S OFFICE

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## Hot Off the Press-Team Updates

**Communication** - A fair is in the planning stage, with vendors, filing demos, web tours, training registration and PACER information.

**Dictionary** - This team is reviewing starter dictionary modifications, additions and deletions.

**Intake** - Stay tuned for information from site visits.

**Operations** - Work continues on the new CA manual. A review is also underway of proposed dictionary event changes.

**Technical** - This team is exploring scanning solutions and creating user accounts.

**Training** - Another introductory training session is scheduled, June 5<sup>th</sup>. Sign up!

Next Issue June 5, 2002:

Feature: The Cm/ECF Dictionary Team  
Job Security for Case Administrators  
Still More FAQ's for Dear Sourcerer

( We wish to acknowledge all of our contributing authors in this and past issues: Debbie Constable, Sandy Frank, Karen Herb, Diane Hydovitz, Janet Meyers, Paula Seagraves, Alan Schut, Denise Smith and Rick Thompson. Thank you!



# OPEN SESAME!

Your guide to CM/ECF

USBC District of Maryland May 8, 2002

## Lynne Seeks Title, and WINS!

### Nothing But The Image

**Y**ou've probably heard PDF files mentioned in reference to CM/ECF, and may wonder what they are.

Adobe PDF, short for Portable Document Format, is a universal file format that preserves all the fonts, formatting, graphics, and color of any source document. Adobe PDF files are compact and can be shared, viewed, navigated, and printed exactly as intended by anyone with free Adobe Acrobat Reader software. You may already have the Adobe Acrobat Reader on your computer or you may download this free program at <http://www.adobe.com>.

You can convert any document to Adobe PDF using Adobe Acrobat 5.0 software. A PDF file will look the same on the screen and in print regardless of what kind of computer you are using or which software package it was created from.

### Dear Sourcerer:

What is the CMECF project? **CM/ECF, Case Management/Electronic Case Files** is the new automated docketing system, that allows attorneys to file petitions and other electronic documents through the Internet.

### What are the benefits of using CM/ ECF?

CM/ECF allows you to file and view documents from the office, home or anywhere you have access to the Internet, 24 hours a day. Documents are automatically docketed as part of the filing process and are immediately available electronically. CM/ECF also provides the following benefits:

- ) 24-hour access to filed documents over the internet - no more standing in line
- ) Automatic email notice of case activity
- ) The ability to download and print documents directly from the system
- ) Concurrent access to case files by multiple parties
- ) Secure storage of files/pleadings (so files are not misplaced)
- ) Potential reduction in copy costs and courier fees

Available in Fall 2002!

Email questions to [marketing@mdb.uscourts.gov](mailto:marketing@mdb.uscourts.gov)

Next Issue May 22, 2002:

Feature: The CM/ECF Chambers Team  
To Scan, or Not To Scan....

More FAQ's for Dear Sourcerer



The newsletter name submitted by Lynne Gravois, Open Sesame, is a winner because it creatively represents the accessibility feature of CM/ECF.

Thanks Lynne!



Just Released!!



**I**ntroducing the CM/ECF Communications & Marketing Team: (above left to right, back row) Alan Schut, Sandy Frank, Diane Hydovitz, Denise Smith, Debbie Constable, (front row) Paula Seagraves and Janet Meyers.

The Communications and Marketing Team is promoting, building support and increasing awareness of the CM/ECF project. The Team has been hard at work for the past 2 months brainstorming many fun and creative ideas to promote CM/ECF. On April 24th the Team rolled out its bi-monthly Press Release/ Newsletter. The newsletter will keep staff and external customers informed on many topics, such as FAQ'S ( Frequently Asked Questions) About CM/ECF, team updates and many other key issues. The Team is currently choosing promotional items and working on a CM/ECF Fair for external customers.

Stay Tuned for more details about the CM/ECF Fair, it will be EXCITING and INFORMATIVE!

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## Hot Off the Press-Team Updates

**Chambers** -They are brainstorming about order processing, calendaring options and interacting with the clerk's office without paper files.

**Dictionary** - They have docketed and tested all the events in the CM/ECF dictionary and made recommendations for event changes.

**Intake** - Stay tuned for information from site visits.

**Operations** - The first draft of the new CA manual is under development. The team is also reviewing the dictionary team's proposed event changes. QC manual, next!

**Technical** - Team reps recently visited with the IT manager in NY.

**Training** - This group provided training to the members of the project team. WOW! When approached by our reporter on the street, here's what people had to say:

**Maggie:** "...The classroom setting was better for me, I actually got instructions."

**Jennifer W.:** "It was good to get hands-on training."

Carol found the training informative. All the students interviewed agreed that CM/ECF is user friendly, even Rebecca, who is a novice to case administration.